knowledge training

WITS Voucher Management System (VMS)

User Guide and Manual

> **The WITS Voucher Management System (VMS)** is a web based application specifically designed for organizations with a need to effectively manage their ATR 3 programs. Capable of creating and managing contracts, vouchers, and funds, WITS VMS also comes with core clinical features essential to managing substance abuse recovery services and treatment case management.

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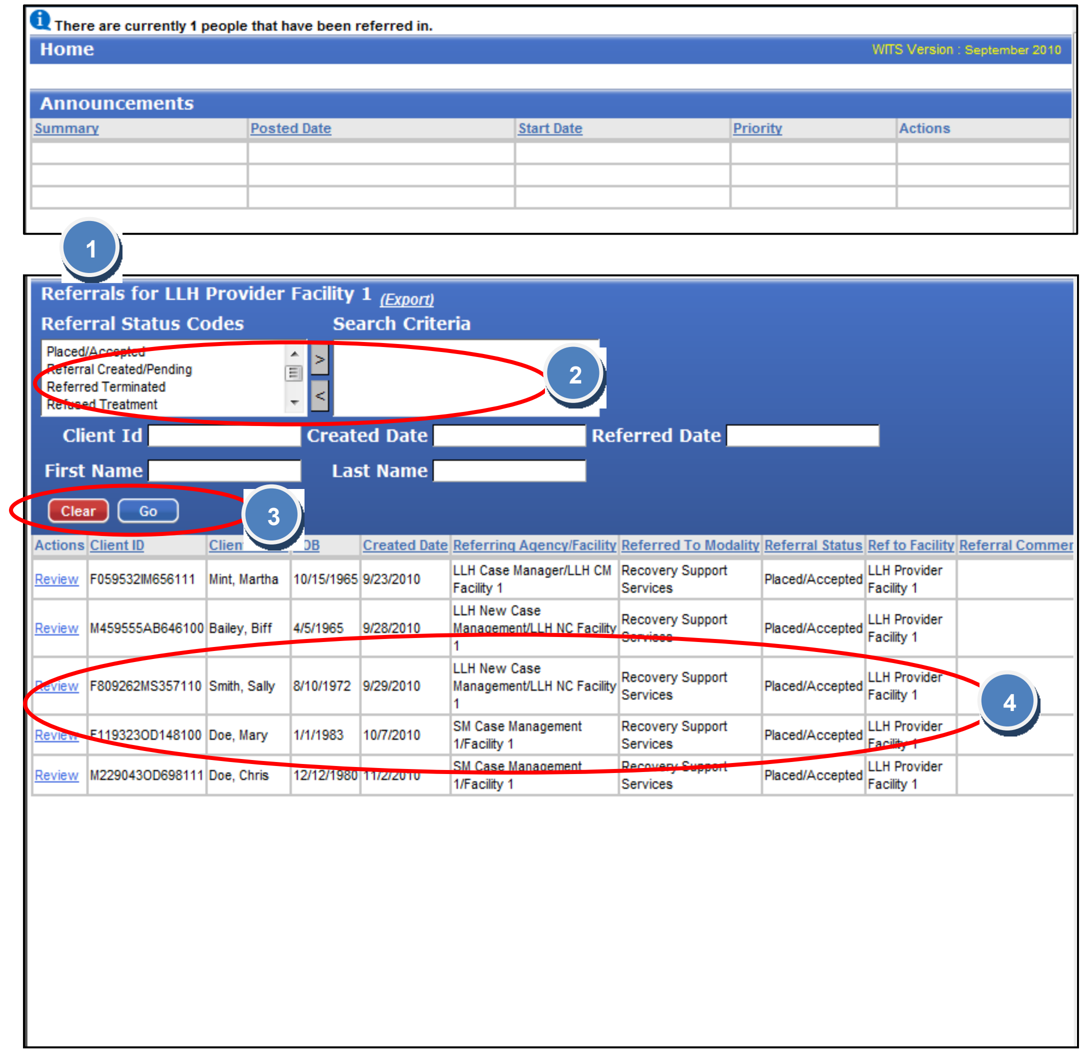
A. Provider

1. Reviewing Referrals in an Agency

Where: Agency > Agency List > Referrals > Referral In

Start: If you have clients which have been referred to your Agency, you will see an alert notice appear on the Home page. To review these referrals, simply click on the **Agency** link followed by the **Agency List** link located in the left side navigation.

1. Once in the **Agency List**, click on the Referrals Link followed by the **Referrals In** link.
2. From the "Referrals Search" screen, select your search criteria from the "Referral Status Codes" box and move them to the "Search Criteria" box by clicking the > button.
3. When you have selected all of your search criteria, click on the Go button to generate your search results list.
4. Notice that any referred clients will appear in the bottom portion of the screen. At this point you can click on the Review link to view the referral information.



Finish: You have searched and selected a referred client.

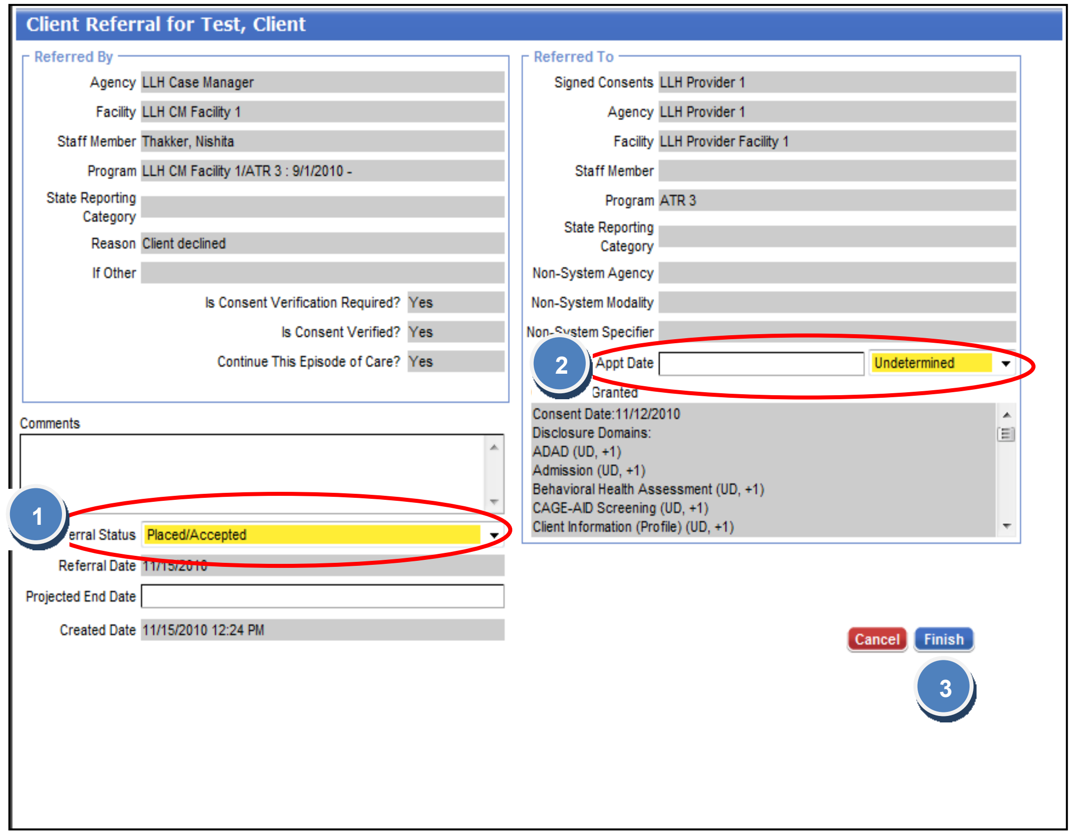
2. Accepting a Referred Client

Where: Agency > Agency List > Referrals > Referral In

Start: Prior to Accepting a referred client, you must first search, select and review the referred client case.

1. When you are reviewing the client referral, you must accept the client into your agency before you can view the client's record or work on the case. To continue, select "**Placed and Accepted**" from the "Referral Status" drop down field.
2. Next, you can fill in the "Appointment Date" and use the drop down box to provide any additional information about the appointment.
3. Click the Finish button to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.
4. Note that you also have the option of choosing from the following list of "Referral Status" reasons:
   a. **Referred/Terminated** – When the referral has been deleted by the referring agency.
   b. **Refused Treatment** – Select if the client does not want to be treated.
   c. **Rejected by Program** – If the client is not eligible or is not acting in compliance.
   d. **Wait List** – If the client is waiting for a slot to open in the program.

Finish: You have searched and selected a referred client.



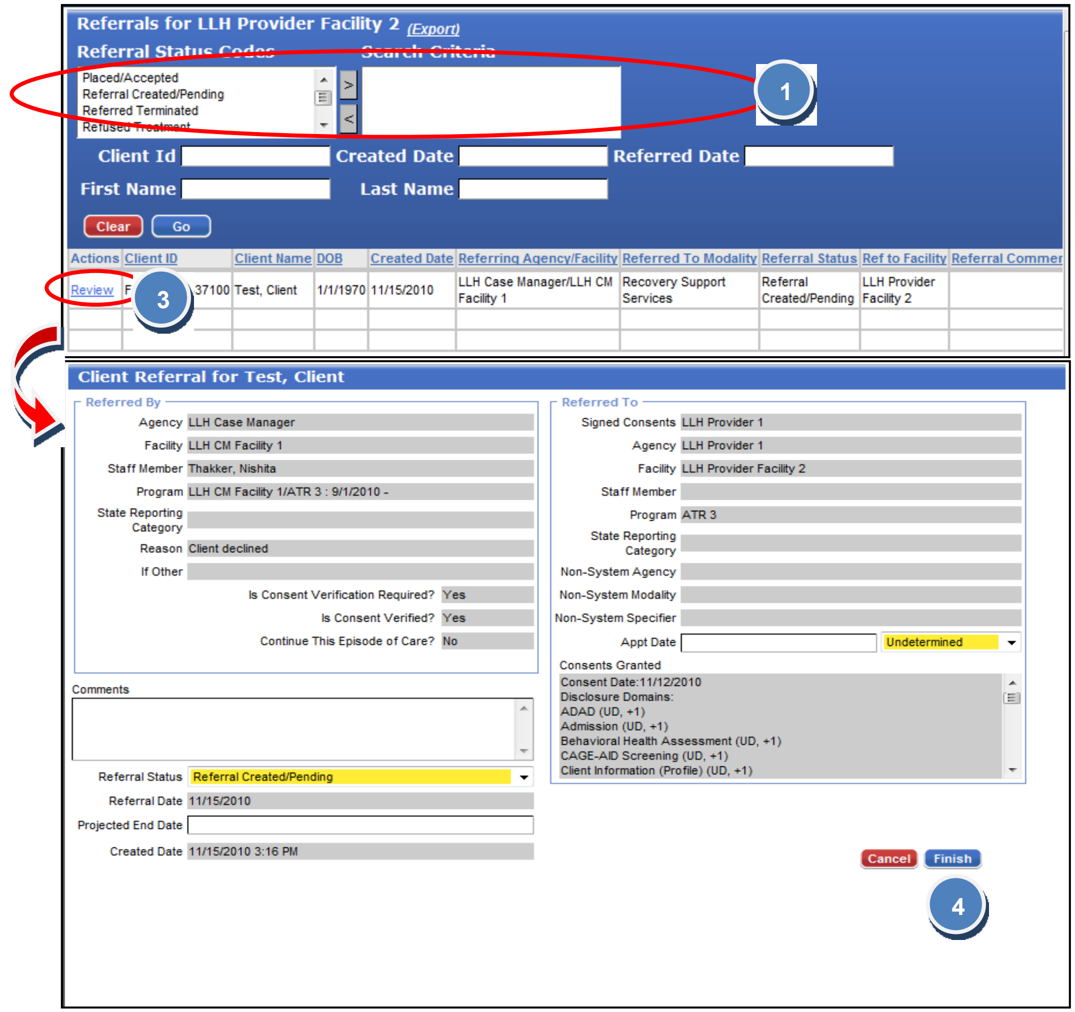
Note: *Once the referral is Placed/Accepted, the client record is created within the Agency, as well as an Intake within the referred to Facility. The intake date will be the same as the referral date.*

3. Reviewing a Voucher Prior to Accepting a Referral

Where: Agency > Agency List > Referrals > Referral In > ***Vouchers***

Start: To review services for a voucher prior to accepting a client referral, you must be in the **Agency** module and the **Referrals In** screen located in the Left side navigation.

1. From the “Referrals Search” screen, select your search criteria from the “Referral Status Codes” box and move them to the “Search Criteria” box by clicking the > button.
2. When you have selected all of your search criteria, click on the Go button to generate your search results list.
3. Notice that any referred clients will appear in the bottom portion of the screen. At this point you can click on the **Review** link to view the referral information.
4. Next, you will see the “Client Referral” screen. Ignore the Cancel and Finish buttons; instead, click on the **Voucher** link which should now appear in the Left side navigation.



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Where: Agency > Agency List > Referrals > Referral In > Vouchers

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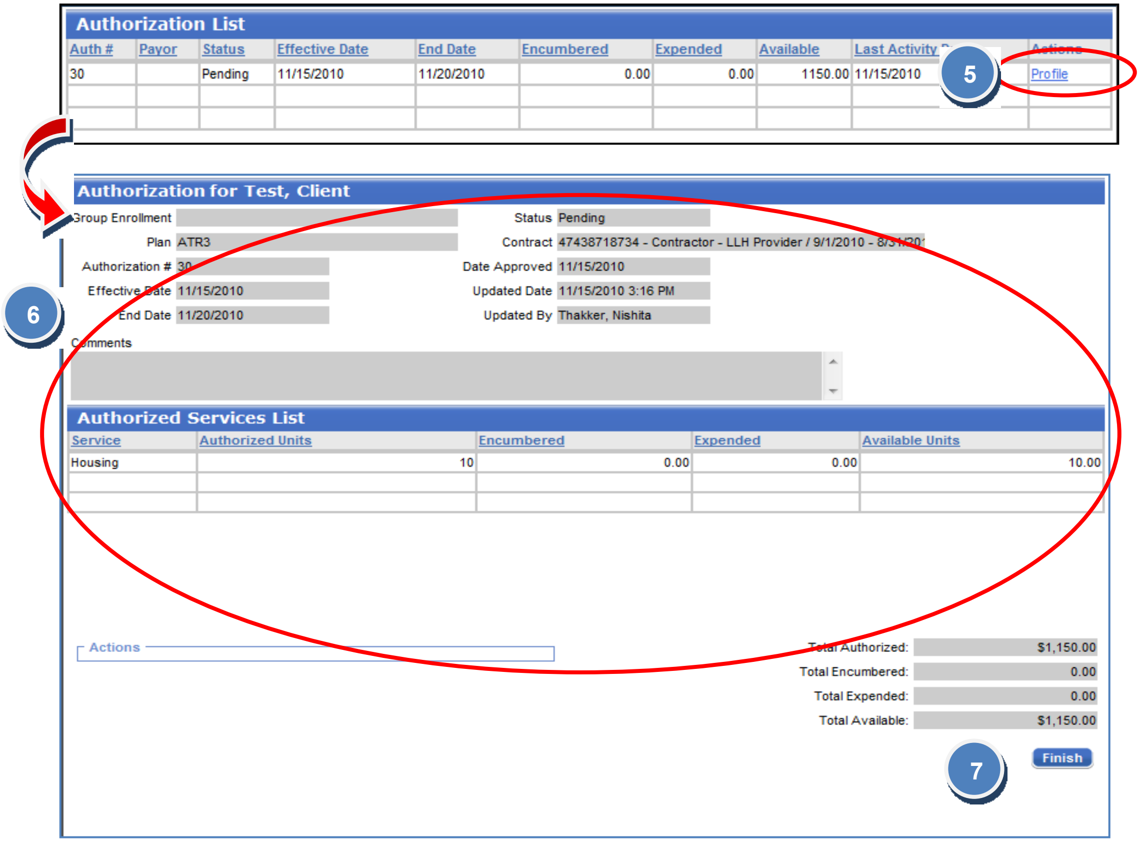
5. On the “Voucher” screen, you should see the voucher list. Proceed and click on the Profile link that corresponds to the voucher.

6. Next you will see the voucher screen with the list of vouched services below it. Note that you will not be able to edit any of the voucher

7. Once you have completed reviewing the Voucher, click on the Finish button to return to the Voucher screen. Repeat the steps if you wish to review additional vouchers.



Finish: You have now reviewed voucher services prior to accepting a client referral.

4. Client Information

Where: *Agency* > ***Client List***

Overview:

To search for a client, click on the **Client List** link in the left navigation menu. A blank Client List screen will appear. WITS VMS will search on any fields you fill in, once you click on the Go button. The more fields you enter the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "*". This is called a wild card search. For instance, if you search for Last Name of "Smit*", you will get people with the last name of "Smith", "Smitty", "Smithson", etc.

Look for your client in the Client List. If you find the right person, pull up the profile by clicking on Profile next to their name

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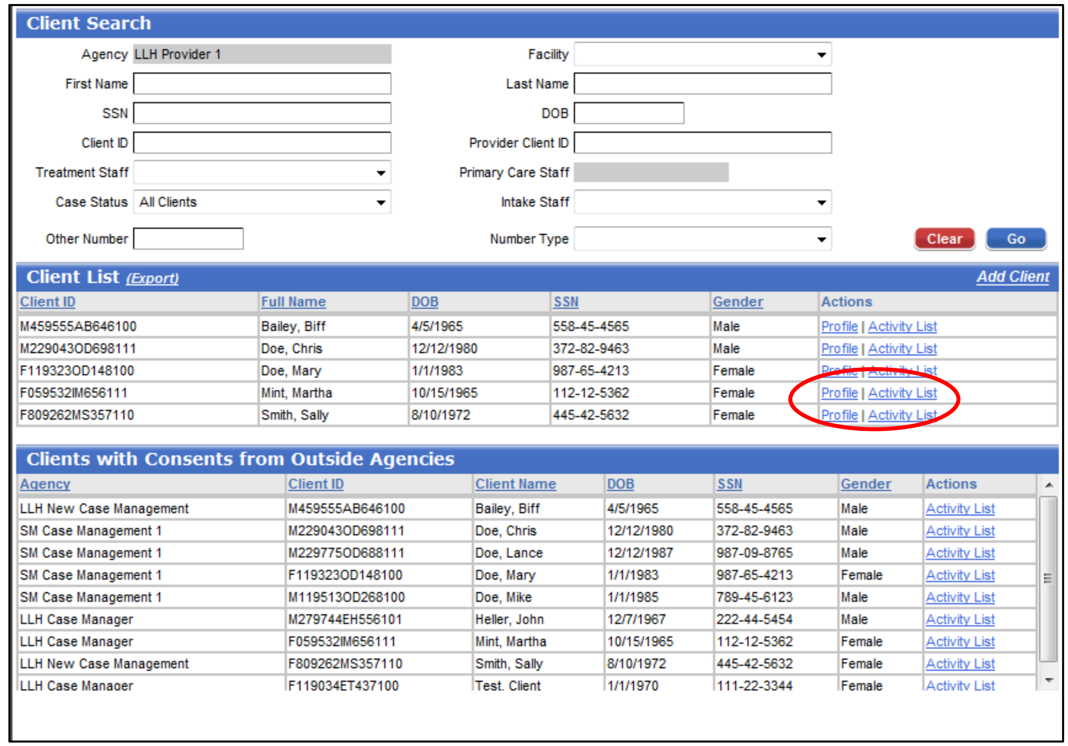

Client ID	Full Name	DOB	SSN	Gender	Actions
M459555AB646100	Bailey, Biff	4/5/1965	558-45-4565	Male	Profile | Activity List
M229043OD698111	Doe, Chris	12/12/1980	372-82-9463	Male	Profile | Activity List
F119323OD148100	Doe, Mary	1/1/1983	987-65-4213	Female	Profile | Activity List
F059532IM656111	Mint, Martha	10/15/1965	112-12-5362	Female	Profile | Activity List
F809262MS357110	Smith, Sally	8/10/1972	445-42-5632	Female	Profile | Activity List

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
LLH New Case Management	M459555AB646100	Bailey, Biff	4/5/1965	558-45-4565	Male	Activity List
SM Case Management 1	M229043OD698111	Doe, Chris	12/12/1980	372-82-9463	Male	Activity List
SM Case Management 1	M229775OD688111	Doe, Lance	12/12/1987	987-09-8765	Male	Activity List
SM Case Management 1	F119323OD148100	Doe, Mary	1/1/1983	987-65-4213	Female	Activity List
SM Case Management 1	M119513OD268100	Doe, Mike	1/1/1985	789-45-6123	Male	Activity List
LLH Case Manager	M279744EH556101	Heller, John	12/7/1967	222-44-5454	Male	Activity List
LLH Case Manager	F059532IM656111	Mint, Martha	10/15/1965	112-12-5362	Female	Activity List
LLH New Case Management	F809262MS357110	Smith, Sally	8/10/1972	445-42-5632	Female	Activity List
LLH Case Manager	F119034ET437100	Test, Client	1/1/1970	111-22-3344	Female	Activity List

Note! *The History sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.*

Where: Client List > Client Profile

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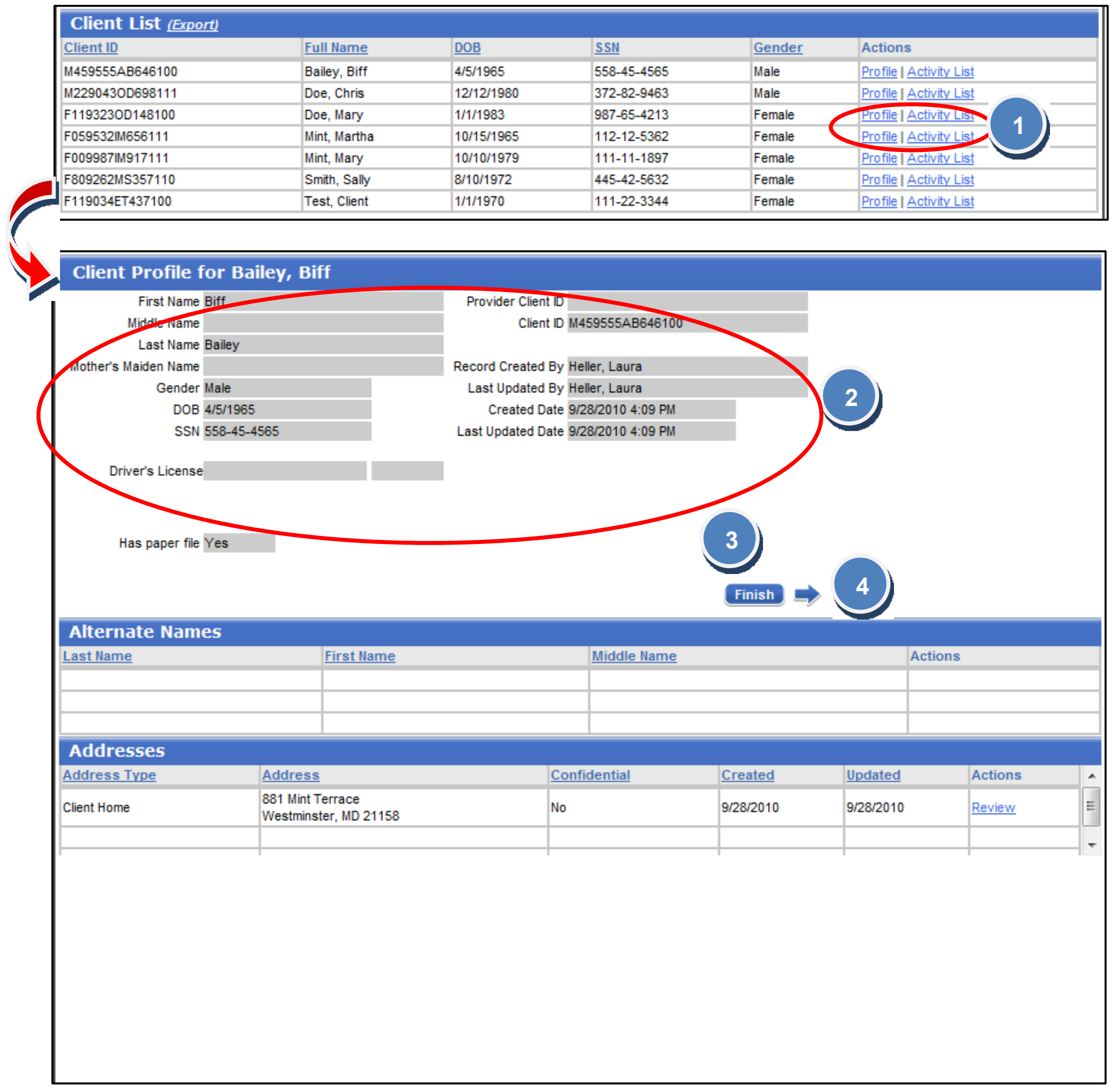
Start: To review a client, make sure that you are in the client list screen by clicking on the **Client List** link in the left-hand navigation menu.

1. From the “Client List” screen, click on the **Profile** link. The client profile screen will then appear.
2. In the “Client Profile” screen you can review the client information including “First Name”, “Last Name”, “Gender”, “DOB” and “SSN”.
3. To quit the screen and come back to the client List screen, click on the Finish button.
4. If you would like to see optional client profile information including **Alternate Name**, **Phone Number** and **Address** and **Additional Information**, click on the button.



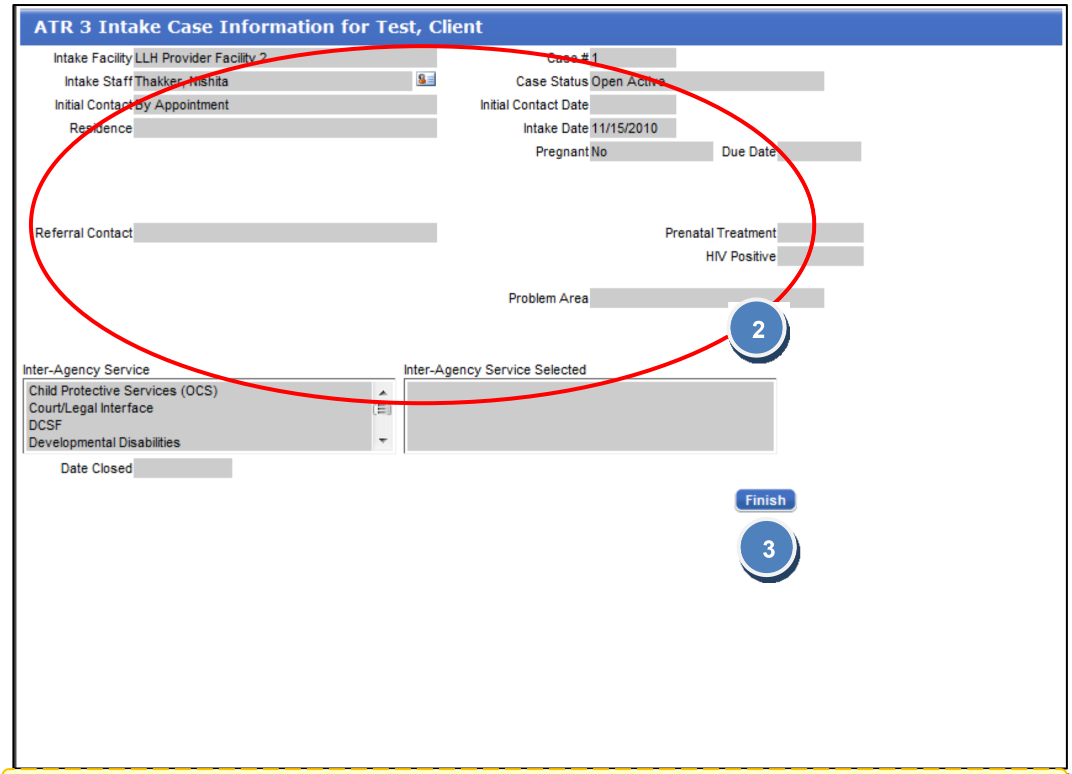
Finish: You have now completed reviewing a Client.

5. Intake

Where: Client List > Activity List > Intake

Start: Make sure that you have selected a client, since everything you do in the Intake will be applied to the client record chosen. To continue, Click on the **Activity List** link located in the left navigation menu. OR from the client List, search for the client and click on Activity list under the actions column.

1. Click on the **Intake** link located in the left navigation menu, and the Intake screen will appear.
2. Continue by reviewing the "Intake Facility", the "Intake Staff" list, as well as the initial contact and the residence. Review Intake date.
3. Quit the screen by clicking on Finish .



Note: *This screen is read only. Your system access doesn't allow you to create new intakes or edit existing ones.*

Finish: You have reviewed an intake.

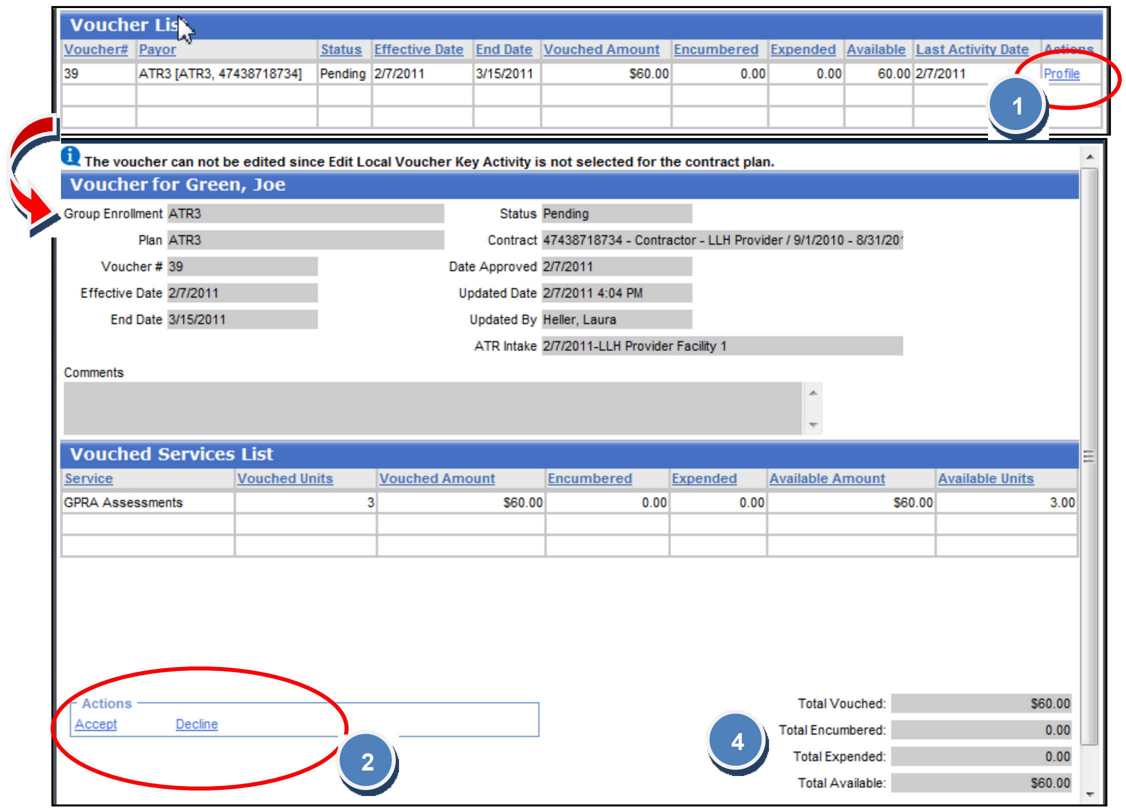
6. Viewing Referred Vouchers

Where: Client List > Client Profile > ***Voucher***

Start: To review a client voucher, be sure that you have first "Placed/Accepted" the referral. While in the client profile module, click on the **Voucher** link located on the left side navigation.

1. In the "Voucher List" screen you will see a list of vouchers available for the client. To view the any of the vouchers, click on the **Profile** link.
2. Next, you should see a Voucher screen with a Vouched Services List at the bottom of the page. After you have reviewed the list, choose to either **Accept** or **Decline** the vouchers using the action links located in the bottom left corner of the screen.
3. If you click on the Accept action link, a message will appear that reads "Are you sure you want to accept this authorization?" Click on the **Yes** button to continue.
4. Note that when the voucher is accepted, the "Voucher" screen will reload in the browser and the only action link available will be to **Close** the voucher. Click on the **Finish** button to complete your selection and to start rendering services and create encounters.

Finish: You have viewed and accepted a voucher.



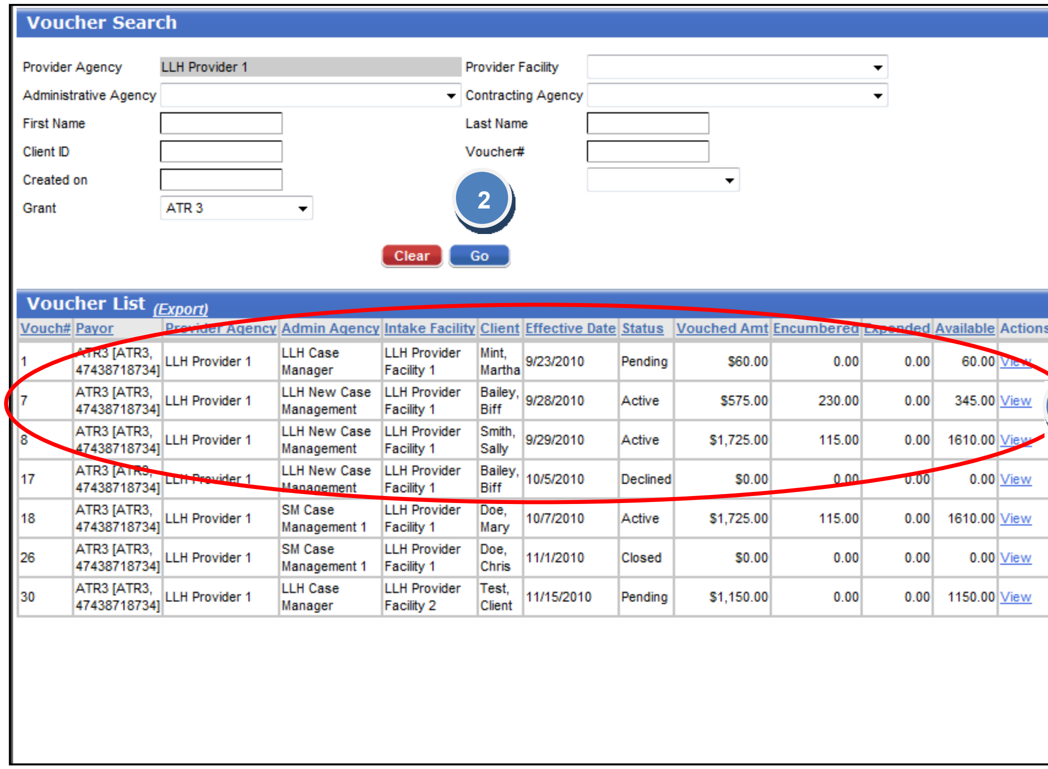
Note: *Once the voucher is accepted, its status is set to "Active" and you can start billing against it. If you decline a voucher, its status will be set to "Declined". The available amount will then be set to $0 and you will not be able to create any encounters against any of the voucher services.*

7. Reviewing Vouchers Within the Current Agency

Where: Agency >Billing > ***Voucher List***

Start: To review all vouchers within the current Agency, you must first select into the **Agency** link followed by the **Billing** link located in the Left side navigation.

1. Next, to get to the “Voucher Search” screen, click on the **Voucher List** link located in the Left side navigation.
2. Once you are in the “Voucher Search” screen, you may search by using any of the available criteria or filters, or you may simply click Go to generate a list of all of the available vouchers within the Agency.
3. The browser window will reload and the voucher list will now appear on the screen with a list of available vouchers. To review any of the vouchers, simply click on the View link. Note you will not be able to edit any of the data in the voucher since you are only reviewing the information.



Vouch#	Payor	Provider Agency	Admin Agency	Intake Facility	Client	Effective Date	Status	Vouched Amt	Encumbered	Expended	Available	Actions
1	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH Case Manager	LLH Provider Facility 1	Mint, Martha	9/23/2010	Pending	$60.00	0.00	0.00	60.00	View
7	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Bailey, Biff	9/28/2010	Active	$575.00	230.00	0.00	345.00	View
8	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Smith, Sally	9/29/2010	Active	$1,725.00	115.00	0.00	1610.00	View
17	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Bailey, Biff	10/5/2010	Declined	$0.00	0.00	0.00	0.00	View
18	ATR3 [ATR3, 47438718734]	LLH Provider 1	SM Case Management 1	LLH Provider Facility 1	Doe, Mary	10/7/2010	Active	$1,725.00	115.00	0.00	1610.00	View
26	ATR3 [ATR3, 47438718734]	LLH Provider 1	SM Case Management 1	LLH Provider Facility 1	Doe, Chris	11/1/2010	Closed	$0.00	0.00	0.00	0.00	View
30	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH Case Manager	LLH Provider Facility 2	Test, Client	11/15/2010	Pending	$1,150.00	0.00	0.00	1150.00	View

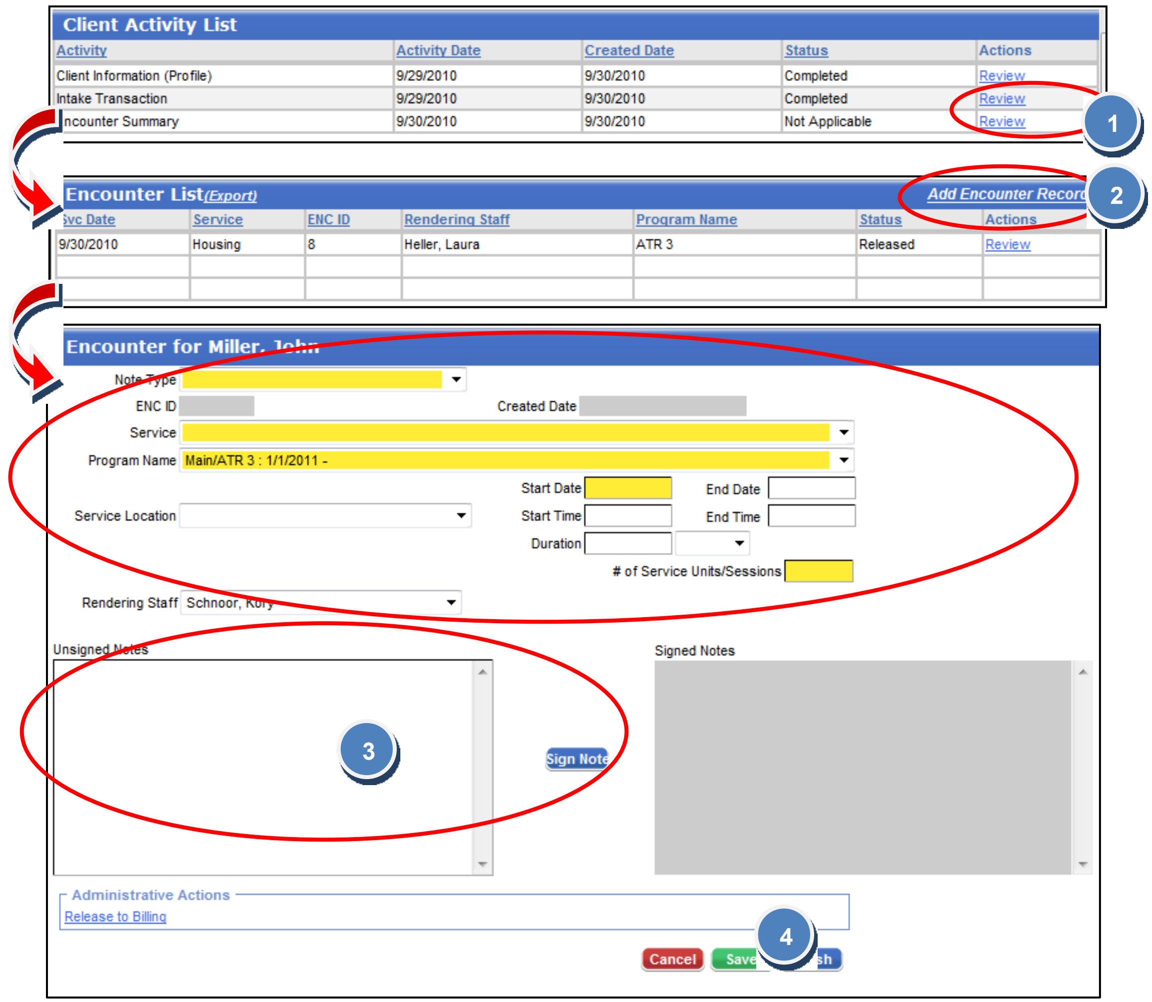
Finish: You have now reviewed available vouchers within an agency.

8. Creating Client Encounters

Where: *Client List > Activity List >* ***Encounters***

Start: From the **Client List** screen, select a client and click on its corresponding **Activity List** link.

1. In the Client Activity List screen, search for encounters and click on its **Review** link.
2. From the "Encounter List" click on the ***Add Encounter Record*** to create a new Encounter for this client. Proceed to complete the required fields including:
    a. **Note Type** – The type of note you wish to enter.
    b. **Service** – Service you wish to render to the client.
    c. **Program Name** – The name of the program the client is admitted to.
    d. **Service Location** – Select from menu.
    e. **Rendering Staff** - Field will be pre-populated with your login name.
    f. **Start date** – The day the encounter is rendered.
    g. **# of Service Units/Session** – this is limited by the units in a voucher.
3. Enter notes corresponding to the Encounter record. Click ***Sign Note*** to save the note with with your name, the date and time.
4. When you have completed creating the encounter, click on the **Finish** button.



Note: The service list shows only services that belong to active vouchers within the current episode. No encounter can be created for services on a closed voucher.
A signed note is required to save any encounter record.

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*Where: Agency > Billing > **Encounter***

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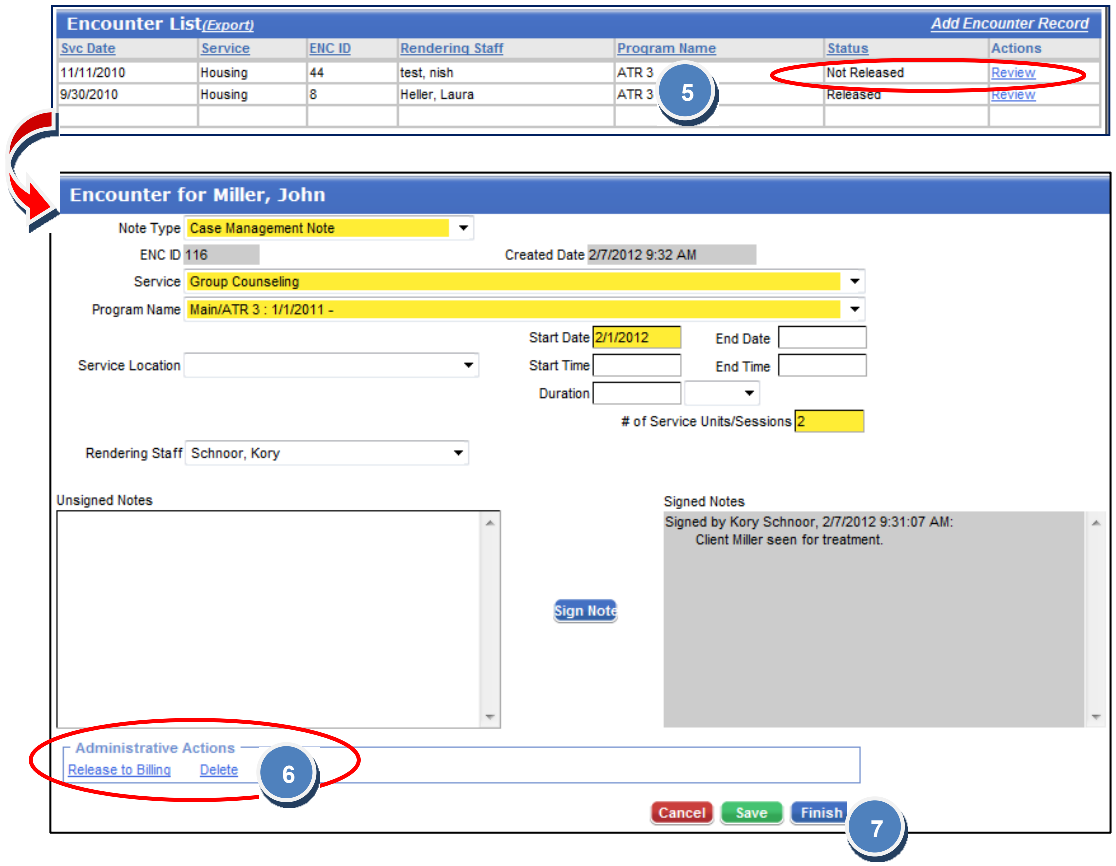
5. Once you have finished creating the encounter, you will be returned to the “Encounter List” screen. Notice that the encounter you have just created appears in the list, and its status is “Not Released”. To see the details of the encounter or to release the encounter to billing, simply click on the **Review** link located under the actions column.
6. Note that when you return to the “Encounter” screen the Administration Actions area will now display two options, **Release to Billing** and **Delete**. If the encounter is ready to be processed for billing, you will have to click on the **Release to Billing** link. If you entered the encounter by mistake or if you want to erase this newly created encounter, you may click on **Delete**.
7. Once you have completed reviewing the encounter and/or released it to billing, continue by clicking on the **Finish** button. Also, if you ever wish to check the billing status of an encounter, check the “Status” column in the “Encounter List” screen.



***Note:** You may not be able to release an encounter to billing if the number of units in the encounters is greater than the voucher’s available amount, if the date of services doesn’t belong to the voucher date, if the voucher is closed or if you exceed your available monthly cap amount.*

Finish: You have now created and released/or deleted an encounter.

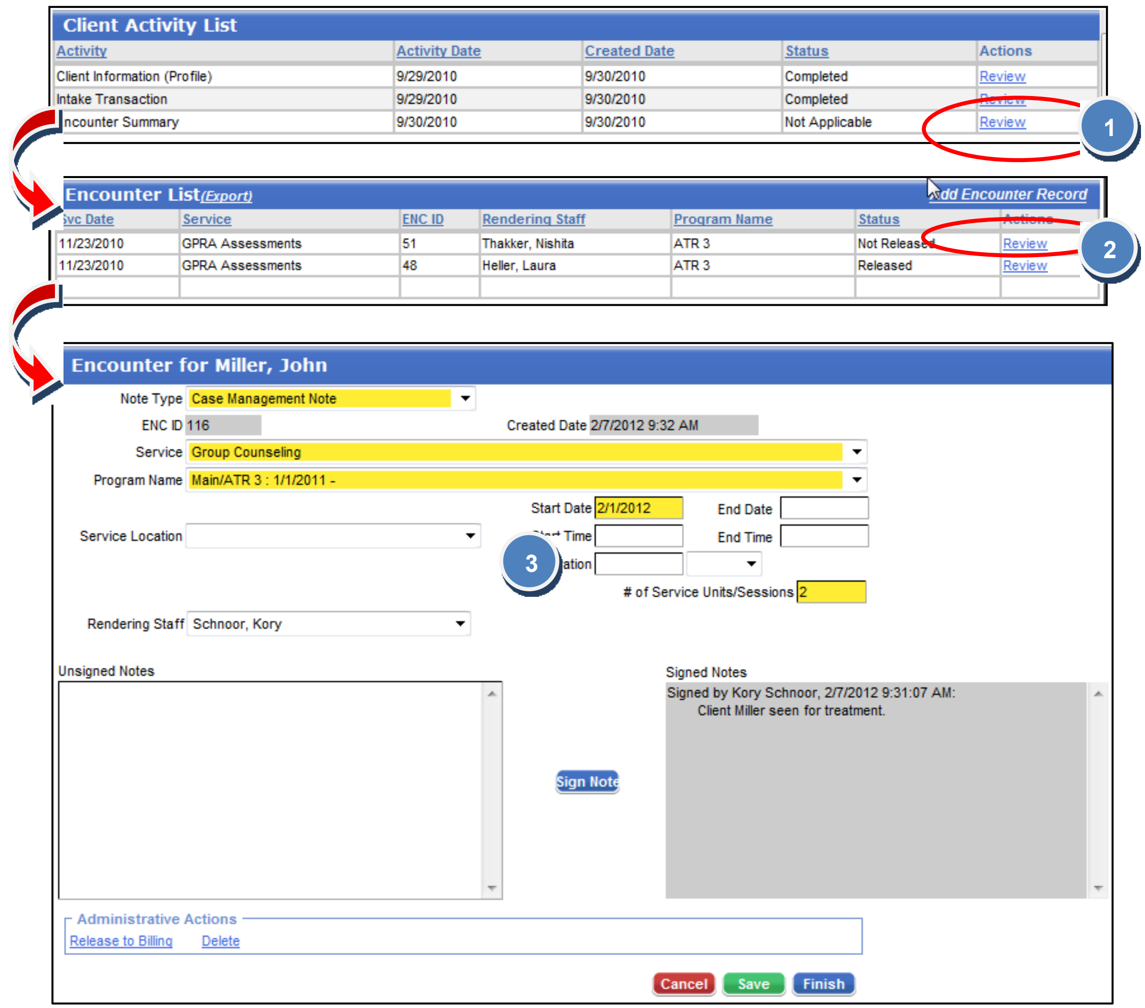
9. Reviewing and Editing Client Encounters

Where:* *Client List > Activity List >* *Encounters

Start: From the Client List screen, select a client and click on its corresponding Activity List link.

1. In the Client Activity List screen, search for encounters and click on the Review link.
2. The resulting screen, called "Encounter List", will display a list of encounters for that client including:
   - **Service date**: The date of the encounter
   - **Service**: The service rendered for the encounter
   - **Status :** The status of the selected encounter

   To continue, select an encounter and click on the Review link.
3. When the encounter record appears, you will be able to update and edit any field that is not in Gray or Read-only. You may add additional notes to the Encounter by typing in the "Unsigned Notes" text box and clicking ***Sign Note***. This action will save additional notes with your name, date and time. Once you have made your changes click on **Finish** to save and complete your changes.

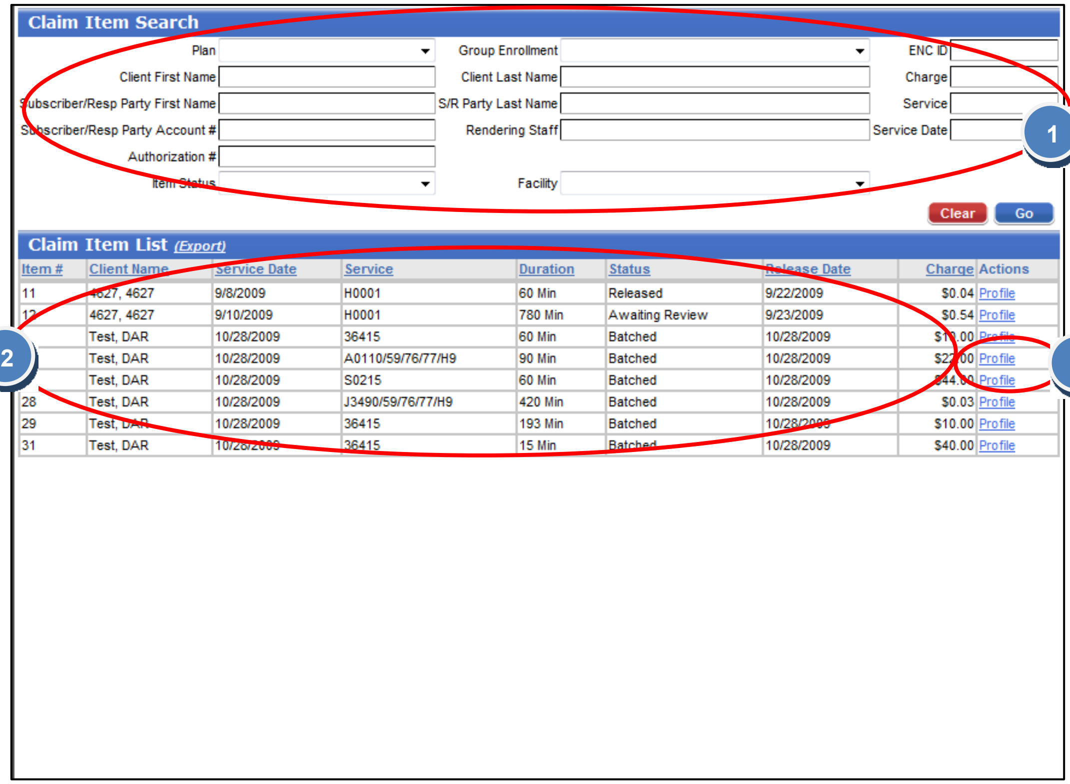


Finish: You have now reviewed and edited encounters.

10.Reviewing and Adjusting Claims

Where: Agency >Billing > Claim Item List

Start: In the Agency module, click on the **Billing** link followed by the **Claim Item List** located in the left-side navigation and you will see the "Claim Item Search" screen. When you first arrive at the Claim Item Search screen by default the claim item list will display results by Item Status "All Awaiting Review".



1. To search for a specific claim item or to filter your results, enter you data in the available search fields. When you have made your selection click on the Go button to view your results. Note, you may also click on the Go button to see the all of the available claims, but be sure that there is not data or selection in the Claim Item Search fields.
2. When your list appears, the claim item list will show you the following:
   a. **Client Name** – name of client record
   b. **Service** – service code
   c. **Status** – billing status of claim
   d. **Release Date** – date the claim item is billed
   e. **Charge** – total amount billed
3. Next, click on the Profile link located under the actions column to view the client claim item.

Note: *When an encounter is released to billing, a claim item is automatically created with a Released status, and it can be reviewed from this screen.*

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Where: Agency >Billing > Claim Item List

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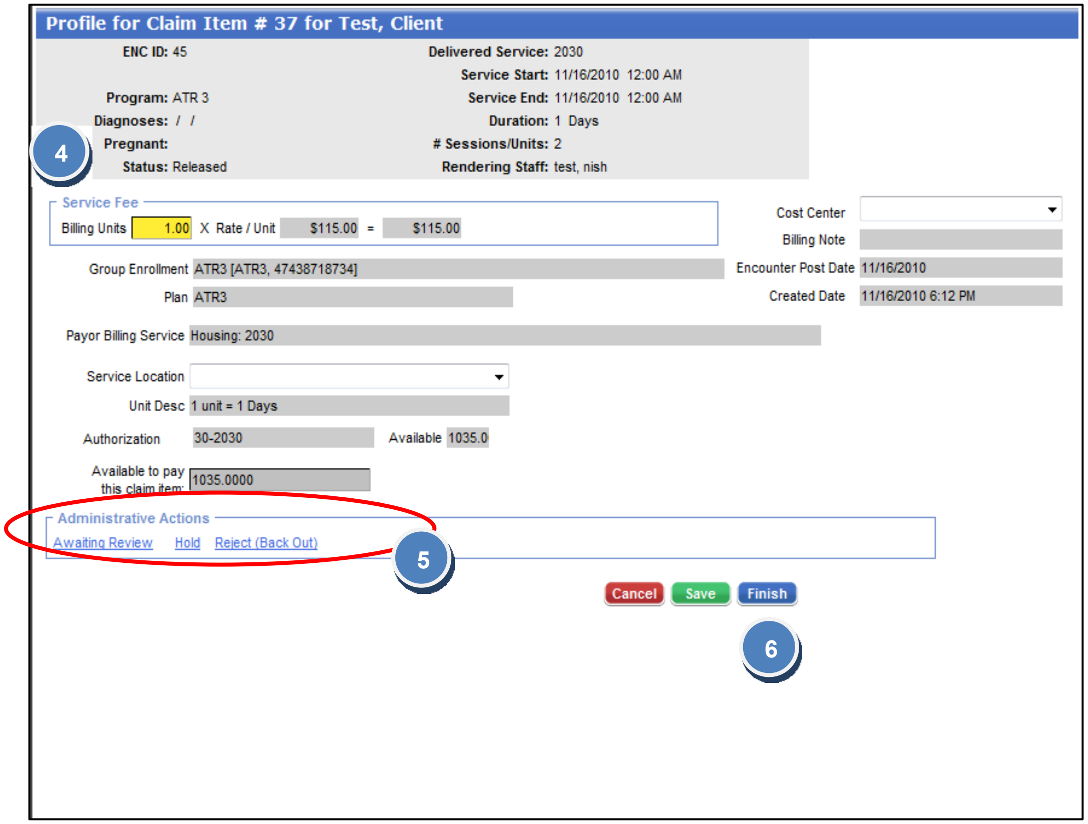
4. You will now see the "Profile for Claim" screen appear. This screen will display all of the claim information and will allow you to make a claim item adjustment. Note that you will only be able to edit a few active fields, as the remaining fields will be read-only fields as indicated in Gray.
5. Next you will have the option of changing the status of the claim item. The Administrative Actions will vary based on the Claim item status. If the claim item is **Released**, choose from the following actions In the Administrative Actions box:
    a. Awaiting Review – This action link will indicate that the claim is awaiting review and approval to release.
    b. Hold – This action link will indicate that the item is pending and isn't ready to be batched and billed.
    c. Reject (Back Out) – This action link will indicate that the claim item may not be billed. Once the claim is rejected, the encounter will appear in red in the encounter list. The user will then be able to delete the encounter or make any changes and release it to billing again.
6. Note that when you have made your selection, the browser window will reload and the claim status is changed. Click on Finish to save and complete your action.



Note: *A claim item with a Released status is ready to be batched and billed by the automated process.*

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Where: Agency List >Billing > Claim Item List

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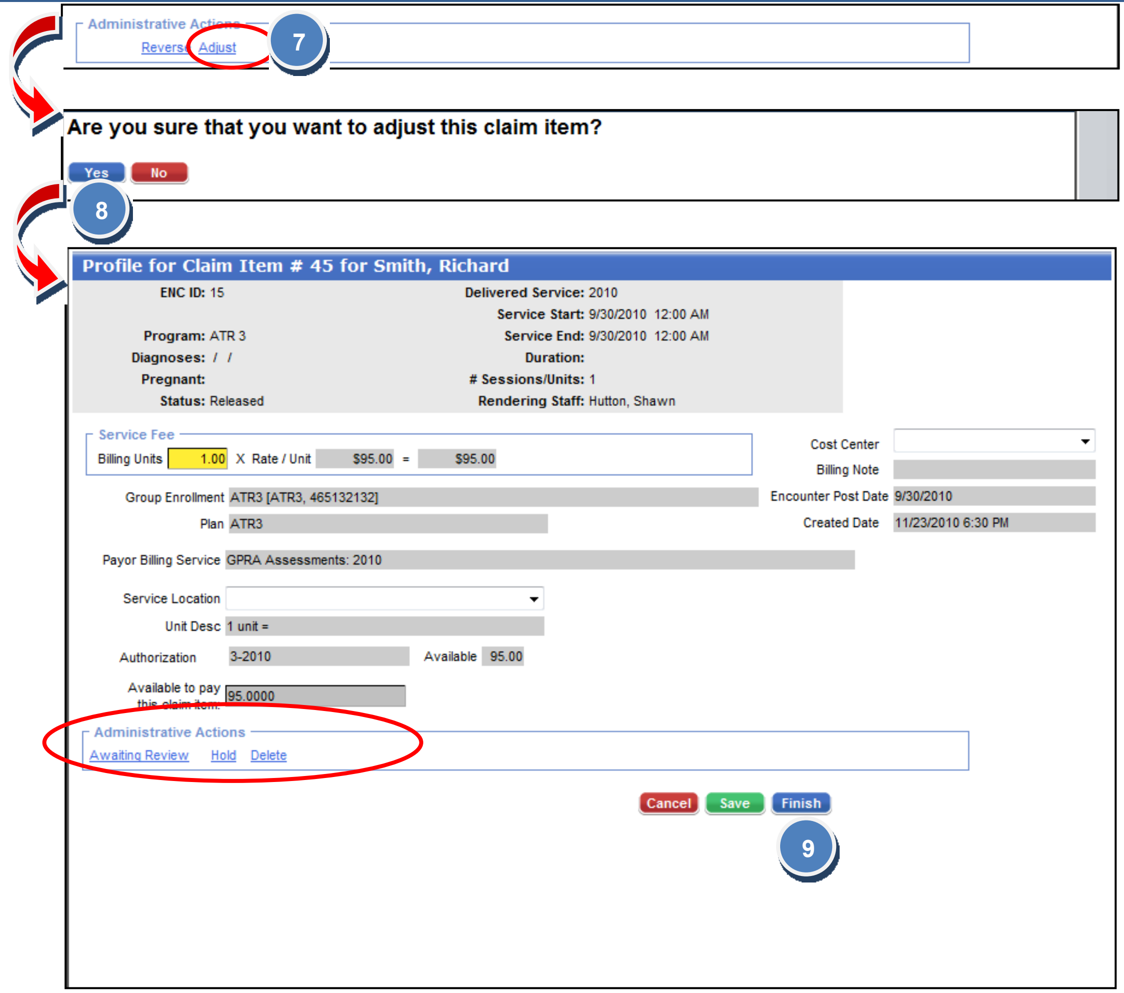
7. If you are reviewing the Profile of a **Batched** Claim item you will be able to choose from the following actions In the Administrative Actions box:
    a. Reverse – This selection will create a reverse transaction of the original claim item. The charge will appear as a negative amount on the Claim Item List screen.
    b. Adjust – This selection will create a reverse transaction of the original claim item as well as a new claim corresponding to the adjustment you just entered. The Claim Item List screen will then show two claim items: negative charge and the adjusted amount.
8. Once you have clicked on any of the two available actions, click on the Yes button to continue.
9. Complete your selection by clicking on the Finish button to go back to the Claim Item List screen.

    Note: The reversal and adjustment claim items are automatically created with the released status. They will then be batched and billed when the next process runs.



> ***Note:*** *When the intake is closed, all the vouchers related to this intake are closed. You may re-open the intake if necessary. You need to be granted the "Case Re-open" role to do so.*

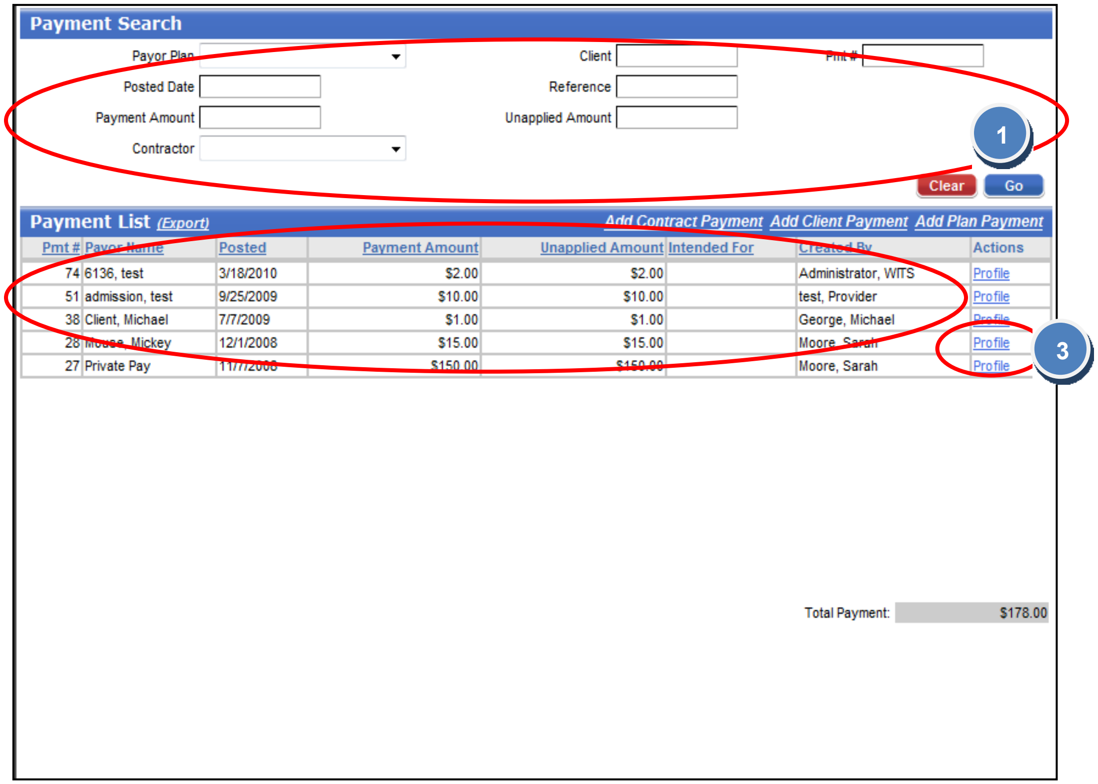
Finish: You have now made a billing adjustment.

11.Reviewing Agency Payments

Where: Agency >Billing > Payment List

Start: To begin, you must first click into the **Billing** module followed by the **Payment List** link located in the left side navigation.

1. When you first see the "Payment List" screen, you will not see any records under the payment list. To generate a list, enter in your search criteria in the "Payment Search" section and click the Go button.
2. Notice that the browser window will reload and the results list will appear on the bottom half section of the screen. Here you will be able to see all of the claims which have been released to billing and are ready for payment, including the following information:
   a. **Payment #** – the payment ID
   b. **Payor Name** – the name of the agency making the payment
   c. **Posted** – the day the claim item was submitted for payment
   d. **Payment Amount** – the dollar amount that is being billed and requires payment
   e. **Unapplied Amount** – the amount remaining which has not been paid
3. Next, click on the Profile link located under the actions column to view a payment item.



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Where: Agency >Billing > Payment List

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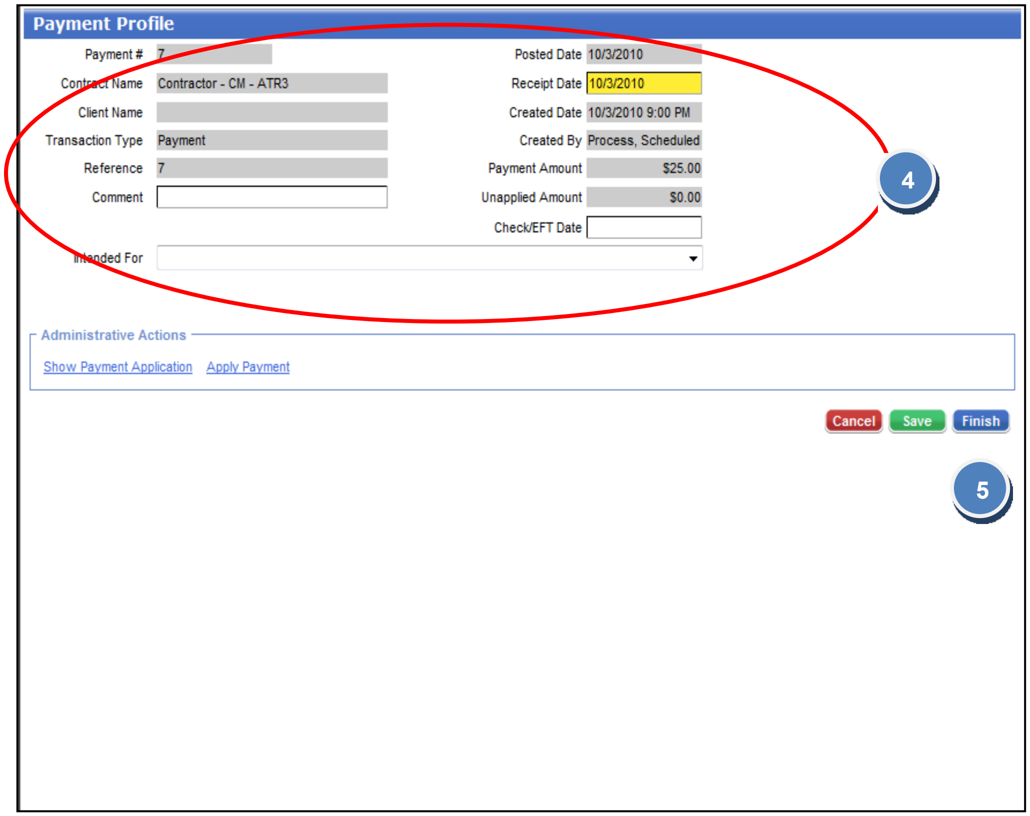
4. Now you will see the “Payment Profile” screen. Proceed and complete any necessary information including:
    a. **Comment** – This will be any note related to accounting or billing.
    b. **Receipt Date** – By default this will be the day the payment is to be posted; however, this is an editable field.
    c. **Intended For** – This will almost always be an account (or existing contract).
5. Next, click on the Finish button if you wish to save your changes and complete review of the payment profile. You will now be taken back to the “Payment List” screen.



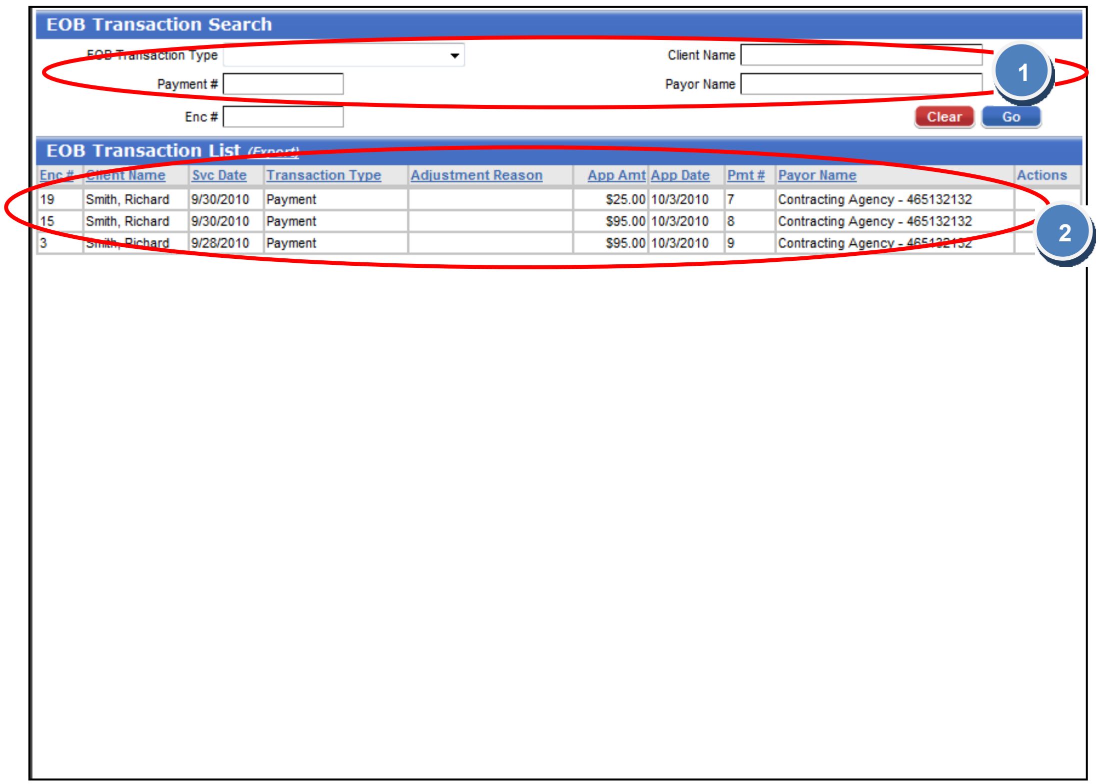
Finish: You have now reviewed an agency payment profile.

12.Reviewing EOB Transactions

Where: Agency >Billing > EOB Transaction

Start: To begin, you must first click into the **Billing** module followed by the **EOB Transaction List** link located in the left side navigation.

1. Next, you will see the “EOB Transaction List” screen. Proceed by entering in your search criteria and clicking on the Go button.
2. Once the web browser page reloads, you will see a list of EOB transactions generated in the bottom half of the screen.



***Note:** The EOB transaction list export will show not only the detail of the payment application, but also the reason for the denial of a particular payment.*

Finish: You have now reviewed an EOB Transaction List.